

Federal Updates & The FAFSA



ECMC



What's Changing for 2017–2018

- **Early FAFSA Launch**

- 2017–18 FAFSA available October 1, 2016, at fafsa.gov
- Change to October 1st launch is permanent

- **Earlier Income Information now Required**

- 2015 tax & income information required
- IRS Data Retrieval Tool available immediately

What's Changing for 2017–2018

CHANGES TO THE FAFSA® PROCESS FOR 2017–18

SUBMIT A FAFSA EARLIER: Students will be able to submit a 2017–18 FAFSA as early as Oct. 1, 2016, rather than beginning on Jan. 1, 2017. The earlier submission date will be a permanent change, enabling students to complete and submit their FAFSAs as early as October 1 every year. (There is NO CHANGE to the 2016–17 schedule. The 2016–17 FAFSA became available Jan. 1, 2016.)

USE EARLIER INCOME AND TAX INFORMATION: Beginning with the 2017–18 FAFSA, students will report income and tax information from an earlier tax year. For example, on the 2017–18 FAFSA, students (and parents, as appropriate) will report their 2015 income and tax information, rather than their 2016 income and tax information.

Here's a summary of key dates for submitting the FAFSA depending on when you plan to go to school:

IF YOU PLAN TO ATTEND COLLEGE FROM	YOU WILL SUBMIT THIS FAFSA	YOU CAN SUBMIT THE FAFSA FROM	USING INCOME AND TAX INFORMATION FROM
July 1, 2015–June 30, 2016	2015–16	January 1, 2015–June 30, 2016	2014
July 1, 2016–June 30, 2017	2016–17	January 1, 2016–June 30, 2017	2015
July 1, 2017–June 30, 2018	2017–18	October 1, 2016–June 30, 2018	2015
July 1, 2018–June 30, 2019	2018–19	October 1, 2017–June 30, 2019	2016

Reasons for the Changes

- **Reason #1: Alignment**

- Many college admissions application deadlines occur in the fall
- Financial aid application done at same time = less confusion

- **Reason #2: Certainty**

- No need to estimate tax info
- IRS Data Retrieval Tool available immediately
- Earlier receipt of Expected Family Contribution (helps with assessing net costs)

- **Reason #3: Less Pressure**

- More time before (most) state and school deadlines
- More time to compare schools before College Signing Day

FAQs About Timing & Reporting

Will deadlines be earlier?

- Most state and school deadlines won't change
- Several states will change from “*as soon as possible after January 1*” to “*as soon as possible after October 1*” (for their first-come, first-served state aid)
- **California** – Still March 2nd for Cal Grants
- School deadlines: see schools' websites

FAQs About Timing & Reporting

Will 2016–2017 FAFSA income info be carried over to Renewal FAFSA?

- No – too much could have changed
- IRS DRT provides easy importation of data to keep process quick

FAQs About Timing & Reporting

Can a student choose to report 2016 income information?

- No – student does not have a choice of which year to report
- Must report info for the year for which the FAFSA requires
- Remember – Certain items on FAFSA are “as of today,” so students must read each question and fill out accordingly

FAQs About Timing & Reporting

Will students receive aid offers earlier if they apply earlier?

- Not necessarily – some schools will make offers earlier; others won't
- collegescorecard.ed.gov allows for cost comparison of schools based on averages
- Remember – early aid offers will likely be estimates (Pell maximum not announced until early 2017)

Other FAFSA Changes

- Added **Medicaid** to list of *Means-Tested Benefits*
- Addition of Medicaid to FAFSA (Questions 75 & 97)
- Sharing the College List with state grant agencies
 - **2017-2018** – list order will be presented in the order they are entered by the student
 - **2018-2019** – list order will be randomized

FSA ID

- **The FSA ID is a *username* and *password* used by students, parents, and borrowers**
 - login to U.S. Department of Education websites
 - electronically sign documents
- **Multiple uses**
 - To apply for federal student aid at fafsa.gov
 - To receive a federal student loan
 - To perform important activities as a federal student loan borrower, such as choosing a repayment plan or applying for a deferment

Using the FSA ID

Website	What can be done at the Site
fafsa.gov	<ul style="list-style-type: none">• Electronically sign the FAFSA• Import tax information from the Internal Revenue Service• Prefill data in this year's FAFSA (if a FAFSA was filed last year)• Make online corrections to an existing FAFSA• View or print an online copy of the <i>Student Aid Report</i> (SAR)
<i>My Federal Student Aid</i> StudentAid.gov/login or <i>National Student Loan Data System</i> (NSLDS®) www.nslds.ed.gov	<ul style="list-style-type: none">• View a history of any federal student aid received• Look up loan servicer's contact information
StudentLoans.gov	<ul style="list-style-type: none">• Complete entrance counseling, the <i>Financial Awareness Counseling Tool</i>, or exit counseling• Electronically sign a master promissory note (MPN).• Complete PLUS loan requests• Estimate student loan payments using the <i>Repayment Estimator</i>• Apply for an income-driven repayment plan or a consolidation loan
<i>Agreement to Serve (ATS)</i> www.teach-ats.ed.gov	<ul style="list-style-type: none">• Sign the ATS for the Teacher Education Assistance for College and Higher Education (TEACH) Grant Program

Do parents need an FSA ID?

- For dependent students, at least one custodial parent will need an FSA ID in order to sign the FAFSA electronically
- Student and parent(s) must have different FSA IDs
- Students must create their own FSA ID
- Parent must create their own FSA ID
- Cannot use the same email address for both parent and student FSA IDs

FSA ID – Forgotten Usernames

English | Español | Help

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Edit Your FSA ID

Enter your username and password and select LOGIN to edit your FSA ID information. If you do not have an FSA ID, click on the [Create An FSA ID](#) tab.

Create An FSA ID | **Edit My FSA ID**

Username (or Verified E-mail Address) * [Forgot My Username](#)

Password * [Forgot My Password](#)

LOGIN

Edit My FSA ID Screen

English | Español | Help

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FAFSA®
Free Application for Federal Student Aid

Home | Help | **SEARCH**

Login

Student Information

Form Approved
OMB No. 1845-0001
App. Exp. 12/31/2016

Instructions are provided for each FAFSA question in the Help and Hints section on the right side of the page and are also available by clicking **Need Help?** at the bottom of the page.

Enter either your (the student's) FSA ID or personal information to log in to FAFSA on the Web.

☒ Enter your (the student's) FSA ID ☐ Enter the student's information

Do not log in with the FSA ID if you are not the student.
[Create an FSA ID](#)

FSA ID Username or Verified E-mail Address [Forgot Username](#)

FSA ID Password [Forgot Password](#)

NEXT

NEED HELP?

Help and Hints

Login Options

The FSA ID, which consists of a user-created username and password, replaced the PIN effective May, 2015. It allows users to electronically access personal information on Federal Student Aid Web sites as well as electronically sign a FAFSA.

Select one:

Enter your FSA ID (only the student should log in with an FSA ID),

Or

Enter the student's name, Social Security Number and date of birth. (You may have to enter your FSA ID later in the process).

FAFSA Log In Screen

FSA ID – Forgotten Usernames

Retrieve Your Username

To retrieve your FSA ID username, use one of the following options:

1. E-mail

If you provided an e-mail address with your FSA ID, enter it and select E-MAIL SECURE CODE. We will send you a secure code that you will enter on the next page. If you're accessing your e-mail via the Web, make sure to open a separate browser window.

E-mail



E-MAIL SECURE CODE ›

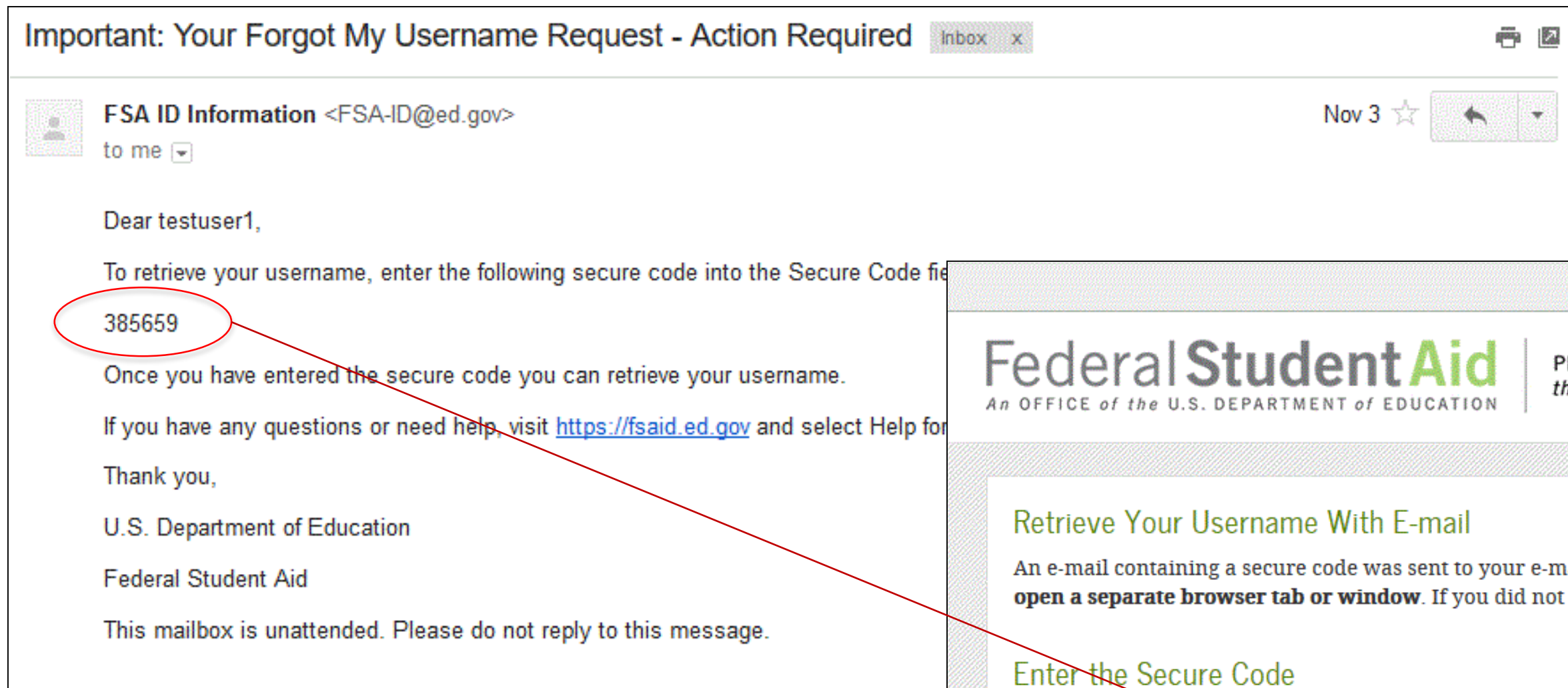
2. Challenge Questions

Provide your Social Security number, last name and date of birth on the next screen and then answer three of your five challenge questions. Select CHALLENGE QUESTIONS for this option.

CHALLENGE QUESTIONS ›

CANCEL

Retrieving Username Using Secure Code



E-mail With Your Secure Code

English | Español Help CANCEL

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Retrieve Your Username With E-mail

An e-mail containing a secure code was sent to your e-mail address on file. Important: If you're accessing your e-mail via the Web, **make sure to open a separate browser tab or window**. If you did not receive an e-mail, you can [request a new secure code](#).

Enter the Secure Code

Enter the secure code below and select CONTINUE to verify your e-mail address. After you verify your e-mail address, you can use it as your username when logging in.

Note: It may take a few minutes for the e-mail to arrive. Check your junk folder if you cannot find the message in your inbox. Some e-mail providers require that you add an e-mail address to your address book before you can receive any e-mail from that address. To ensure that our messages can be delivered to your inbox, enter our originating e-mail address, FSA-ID@ed.gov into your address book.

Secure Code *

CANCEL SUBMIT

Retrieving Username Using Secure Code

Forgot Username

Your username is shown below.

Note: If you have an e-mail address associated with your FSA ID and have verified it, you can use it, with your password, to log in to FSA systems instead of your username.

- Your FSA ID username is: fsatestuser1

Select RETURN TO LOGIN to return to the log-in page.

RETURN TO LOGIN ›

Locked out of FSA ID account

English | Español Help CANCEL

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Unlock Your FSA ID

Your FSA ID is locked. To unlock it, use one of the following options:

1. E-mail

If you provided an e-mail address with your FSA ID, we will send you a secure code that you will enter on the next page. Select E-MAIL for this option. If you're accessing your e-mail via the Web, make sure to open a separate browser window.

E-MAIL ›

2. Challenge Questions

Answer three of your five challenge questions. Select CHALLENGE QUESTIONS for this option.

CHALLENGE QUESTIONS ›

CANCEL

Important Dates

- FAFSA Demo Site available – September 26th
- 2017-2018 FAFSA on the Web available – October 1st
- IRS Data Retrieval Tool (DRT) available – October 1st
- Student Aid Report (SAR) distribution – October 3rd

Materials & Resources for Outreach

Financial Aid Toolkit

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Financial Aid Toolkit

Learn About Financial Aid

Conduct Outreach

Get Training

Search Financial Aid Tools and Resources

Help students and parents prepare for college or career school.

The Financial Aid Toolkit provides federal student aid information and outreach tools for counselors, college access professionals, nonprofit mentors, and others.



LEARN ABOUT FINANCIAL AID

Understand the basics of federal student aid, the FAFSA, and loan repayment.



CONDUCT OUTREACH

Get tips on hosting events; sample financial aid night PowerPoint presentations; and suggested messages for social media, e-mails, or newsletters.



GET TRAINING

Find training or conference opportunities and learn about the National Training for Counselors and Mentors (NT4CM) program.



SEARCH TOOLS AND RESOURCES

Search our resource library by content, audience, topic, and time of year.

ANNOUNCEMENTS

FAFSA CHANGES FOR 2017-18

Materials & Resources for Outreach

Financial Aid Toolkit

- FinancialAidToolkit.ed.gov/fafsa
- FinancialAidToolkit.ed.gov/resources
- FinancialAidToolkit.ed.gov/fafsa-changes
 - Talking points
 - Table of FAFSA launch dates and tax years
 - Fact sheets for counselors and parents & college students
 - Outreach calendar
 - PowerPoint presentations
 - Information about upcoming webinars

Materials & Resources for Outreach

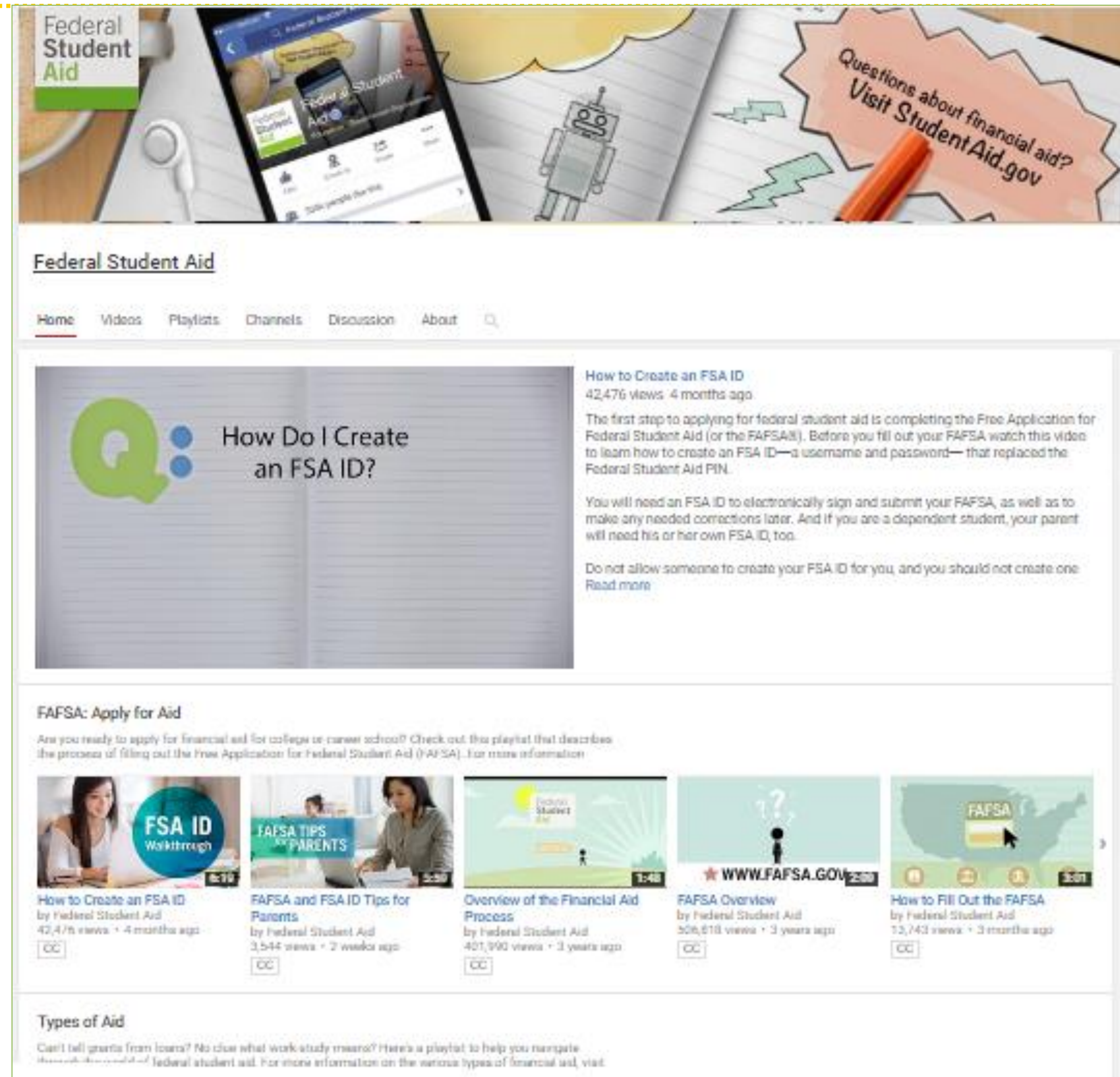
Fact Sheets		
What's an FSA ID and Why Do I Need One?	PDF	PDF
Am I Dependent or Independent?	PDF	PDF
Who Is My "Parent" When I Fill Out the FAFSA?	PDF	PDF
College Students and Parents: What You Need to Know About the 2017–18 FAFSA®	PDF	Coming spring 2016
Myths About Financial Aid	PDF	PDF

Materials & Resources for Outreach

Social Media

- [Twitter.com/FAFSA](https://twitter.com/FAFSA)
- [Facebook.com/FederalStudentAid](https://facebook.com/FederalStudentAid)
- YouTube.com/FederalStudentAid

FSA's YouTube Page



FAFSA on the Web (FOTW)



ECMC



FAFSA on the Web (FOTW)

Start here for:

- Initial FAFSA
- Corrections
- Signatures / FSA ID
- Continuing a saved FAFSA
- Renewal FAFSA

www.fafsa.gov

The screenshot shows the FAFSA on the Web (FOTW) homepage. At the top, it features the 'Federal Student Aid' logo, the text 'An OFFICE of the U.S. DEPARTMENT of EDUCATION', and 'PROUD SPONSOR of the AMERICAN MIND®'. The main heading is 'Free Application for Federal Student Aid FAFSA®'. Below this is a navigation bar with icons for Home, About Us, FSA ID, StudentAid.gov, and Help, along with a search bar and language options (English, Español). The main content area has a large blue banner that says 'Get help paying for college' and 'Submit a Free Application for Federal Student Aid (FAFSA)'. Below the banner are two columns: 'New to the FAFSA?' with a 'Start A New FAFSA' button, and 'Returning User?' with a list of options (Make a correction, Add a school, View your Student Aid Report (SAR), and more...) and a 'Login' button. The bottom section contains links for 'CPS Web Applications Demo System', 'Deadlines', 'School Code Search', 'FAFSA Filing Options', and 'Announcements'. The footer includes 'Site Last Updated: Wednesday, July 1, 2015', 'FOIA | Privacy | Security | Notices', and 'WhiteHouse.gov | USA.gov | ED.gov'.

FOTW Overview: 7-Step Process



Step 1: About the Student



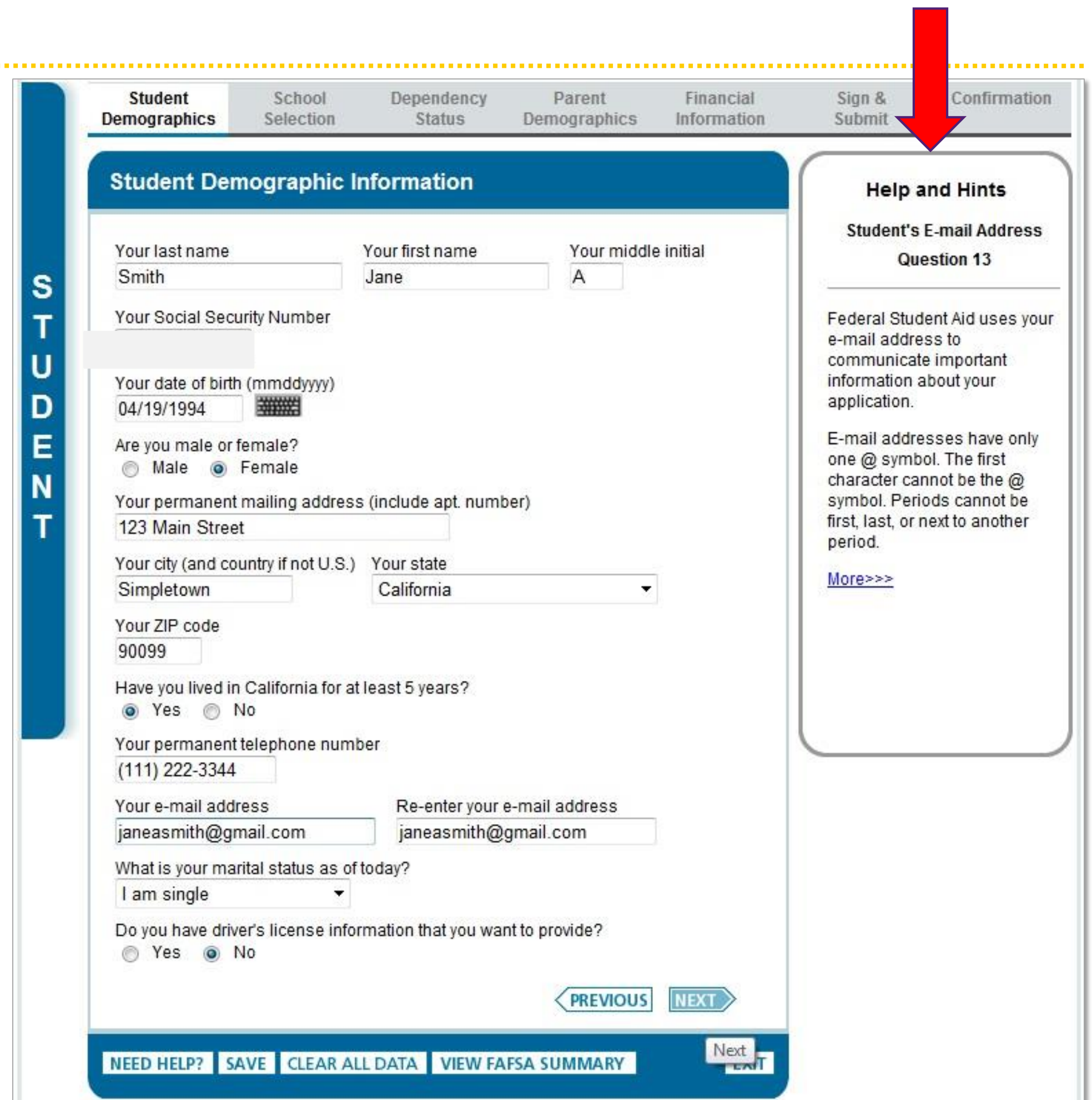
Student Demographics

Check for:

- Name matches student Social Security card
 - Watch out – Naturalized Citizens
- Transposed numbers
- Incorrect data in numeric fields

Tip: Use the **Help and Hints** section on each page

Simple mistakes can delay processing FAFSA and determining eligibility for financial aid



The screenshot shows the FAFSA Student Demographic Information page. A red arrow points to the 'Help and Hints' section on the right. The page includes a navigation bar with tabs: Student Demographics, School Selection, Dependency Status, Parent Demographics, Financial Information, Sign & Submit, and Confirmation. The 'Student Demographics' tab is active. The main form area is titled 'Student Demographic Information' and contains the following fields:

- Your last name: Smith
- Your first name: Jane
- Your middle initial: A
- Your Social Security Number: [Redacted]
- Your date of birth (mmddyyyy): 04/19/1994
- Are you male or female? ☐ Male ☒ Female
- Your permanent mailing address (include apt. number): 123 Main Street
- Your city (and country if not U.S.): Simpletown
- Your state: California
- Your ZIP code: 90099
- Have you lived in California for at least 5 years? ☒ Yes ☐ No
- Your permanent telephone number: (111) 222-3344
- Your e-mail address: janeasmith@gmail.com
- Re-enter your e-mail address: janeasmith@gmail.com
- What is your marital status as of today? I am single
- Do you have driver's license information that you want to provide? ☐ Yes ☒ No

At the bottom of the form are buttons for 'PREVIOUS', 'NEXT', 'NEED HELP?', 'SAVE', 'CLEAR ALL DATA', 'VIEW FAFSA SUMMARY', and a 'Next' button with an 'EXIT' link.

Help and Hints
Student's E-mail Address
Question 13

Federal Student Aid uses your e-mail address to communicate important information about your application.

E-mail addresses have only one @ symbol. The first character cannot be the @ symbol. Periods cannot be first, last, or next to another period.

[More>>>](#)

Student Eligibility

Important

Important Items:

- Citizenship status
- High school graduation status
- Grade level
- Question regarding **foster youth** status

Student Eligibility

Are you a U.S. citizen?

Are you registered with the Selective Service System?
☒ Yes ☐ No

When you begin college in the 2017-2018 school year, what will be your high school completion status?

When you begin the 2017-2018 school year, what will be your grade level?

When you begin the 2017-2018 school year, what degree or certificate will you be working on?

Are you interested in being considered for work-study?

Will you have your first bachelor's degree before July 1, 2017?
☐ Yes ☒ No

Are you a foster youth or were you at any time in the foster care system?

Highest school completed by Parent 1

Highest school completed by Parent 2

[PREVIOUS](#) [NEXT](#)

[NEED HELP?](#) [SAVE](#) [CLEAR ALL DATA](#) [VIEW FAFSA SUMMARY](#) [EXIT](#)

Student Eligibility

Students with a high school diploma must:

- Identify their high school
- Select **Confirm** to find a match
- **Select** the school from the list *or* select **Next** to continue if the school is not showing on the list

The screenshot shows a web application for Student Eligibility. At the top, there is a navigation bar with tabs: Student Demographics, School Selection, Dependency Status, Parent Demographics, Financial Information, Sign & Submit, and Confirmation. The 'Student Demographics' tab is active. Below the navigation bar, the main content area is titled 'Student Eligibility continued'. It contains three text input fields: 'What is the name of your high school?' (with 'burbank' entered), 'In what city is your high school located?' (with 'burbank' entered), and 'In what state is your high school located?' (with 'California' selected in a dropdown menu). A blue 'CONFIRM' button is positioned below the state dropdown. To the right of the main form is a 'Help and Hints' sidebar. It includes the title 'Student's High School Name, City, and State' and 'Question 27'. The text in the sidebar reads: 'Enter the name, city, and state of the high school where you received or will receive your high school diploma. Enter as much information as possible to receive the most relevant search results. For the high school name and city, you may enter the full name or commonly accepted abbreviations or aliases. For example, you can enter'. At the bottom of the main form, there are buttons for 'PREVIOUS' and 'NEXT'. At the very bottom of the page, there is a footer bar with buttons: 'NEED HELP?', 'SAVE', 'CLEAR ALL DATA', 'VIEW FAFSA SUMMARY', and 'EXIT'. A vertical blue bar on the left side of the main form contains the word 'STUDENT' written vertically.

Step 2: School Selection



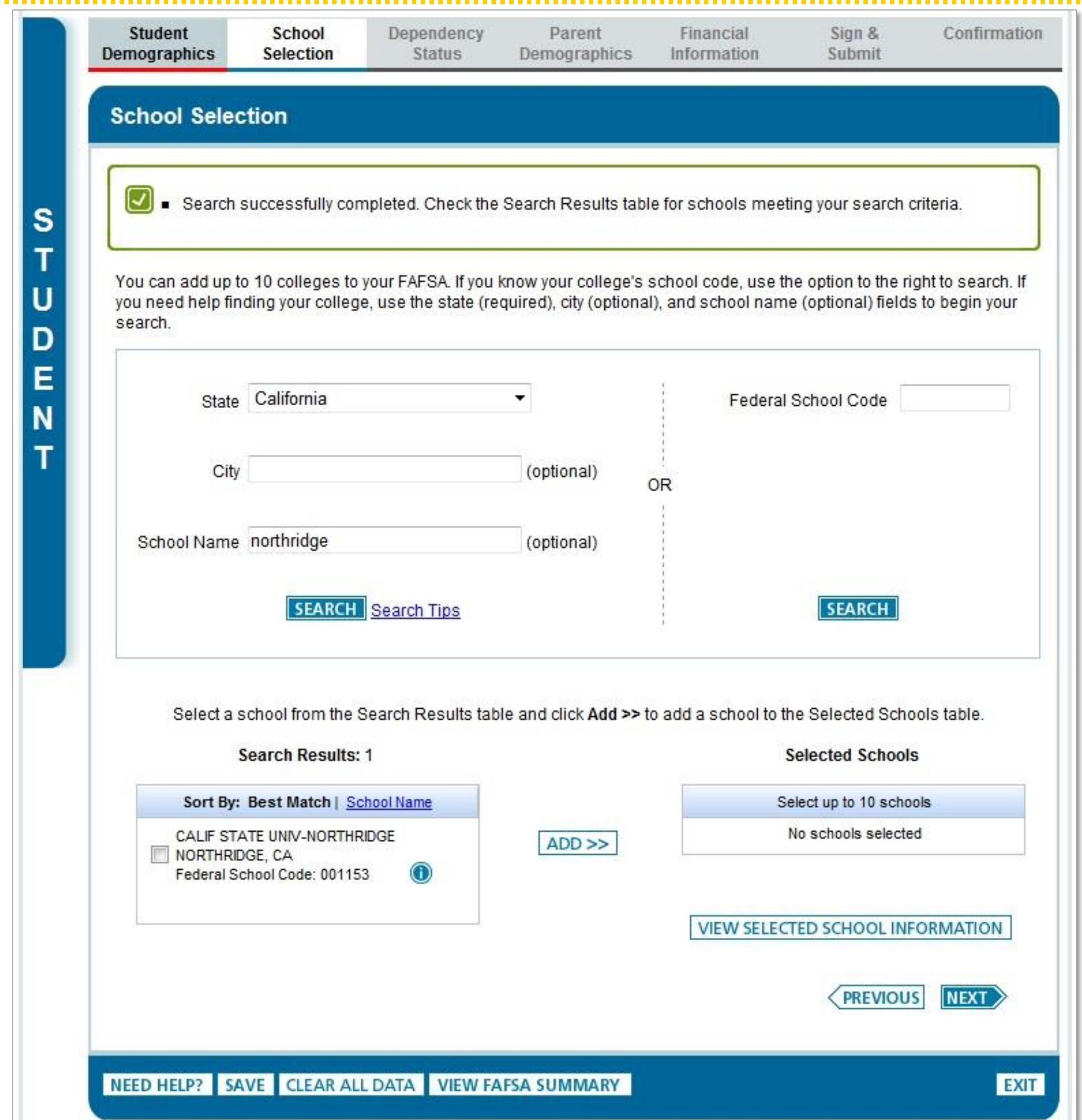
School (college) Selection

Add a school

- Federal School Code
- Search by:
 - State
 - City
 - Name of college

Housing plans

- On campus
- With parent
- Off campus



The screenshot shows the FAFSA School Selection page. At the top, there are tabs for Student Demographics, School Selection (active), Dependency Status, Parent Demographics, Financial Information, Sign & Submit, and Confirmation. A vertical 'STUDENT' label is on the left. A green message box states: 'Search successfully completed. Check the Search Results table for schools meeting your search criteria.' Below this, instructions state: 'You can add up to 10 colleges to your FAFSA. If you know your college's school code, use the option to the right to search. If you need help finding your college, use the state (required), city (optional), and school name (optional) fields to begin your search.' The search form includes fields for State (California), City (optional), School Name (northridge, optional), and Federal School Code. There are 'SEARCH' buttons and a 'Search Tips' link. Below the search form, instructions say: 'Select a school from the Search Results table and click Add >> to add a school to the Selected Schools table.' The 'Search Results: 1' section shows a table with one entry: 'CALIF STATE UNIV-NORTHRIDGE' with a checkbox, 'NORTHRIDGE, CA', and 'Federal School Code: 001153'. An 'ADD >>' button is next to it. The 'Selected Schools' section shows 'Select up to 10 schools' and 'No schools selected'. A 'VIEW SELECTED SCHOOL INFORMATION' button is below. At the bottom, there are 'PREVIOUS' and 'NEXT' buttons. The footer contains links: 'NEED HELP?', 'SAVE', 'CLEAR ALL DATA', 'VIEW FAFSA SUMMARY', and 'EXIT'.

STUDENT

Student Demographics School Selection Dependency Status Parent Demographics Financial Information Sign & Submit Confirmation

School Selection

☒ Search successfully completed. Check the Search Results table for schools meeting your search criteria.

You can add up to 10 colleges to your FAFSA. If you know your college's school code, use the option to the right to search. If you need help finding your college, use the state (required), city (optional), and school name (optional) fields to begin your search.

State Federal School Code

City (optional) OR

School Name (optional)

[Search Tips](#)

Select a school from the Search Results table and click **Add >>** to add a school to the Selected Schools table.

Search Results: 1

Sort By: **Best Match** | [School Name](#)

<input type="checkbox"/>	CALIF STATE UNIV-NORTHRIDGE	<input type="button" value="ADD >>"/>
	NORTHRIDGE, CA	
	Federal School Code: 001153	i

Selected Schools

Select up to 10 schools

No schools selected

[VIEW SELECTED SCHOOL INFORMATION](#)

[PREVIOUS](#) [NEXT](#)

[NEED HELP?](#) [SAVE](#) [CLEAR ALL DATA](#) [VIEW FAFSA SUMMARY](#) [EXIT](#)

Step 3:

Determining Student Dependency Status

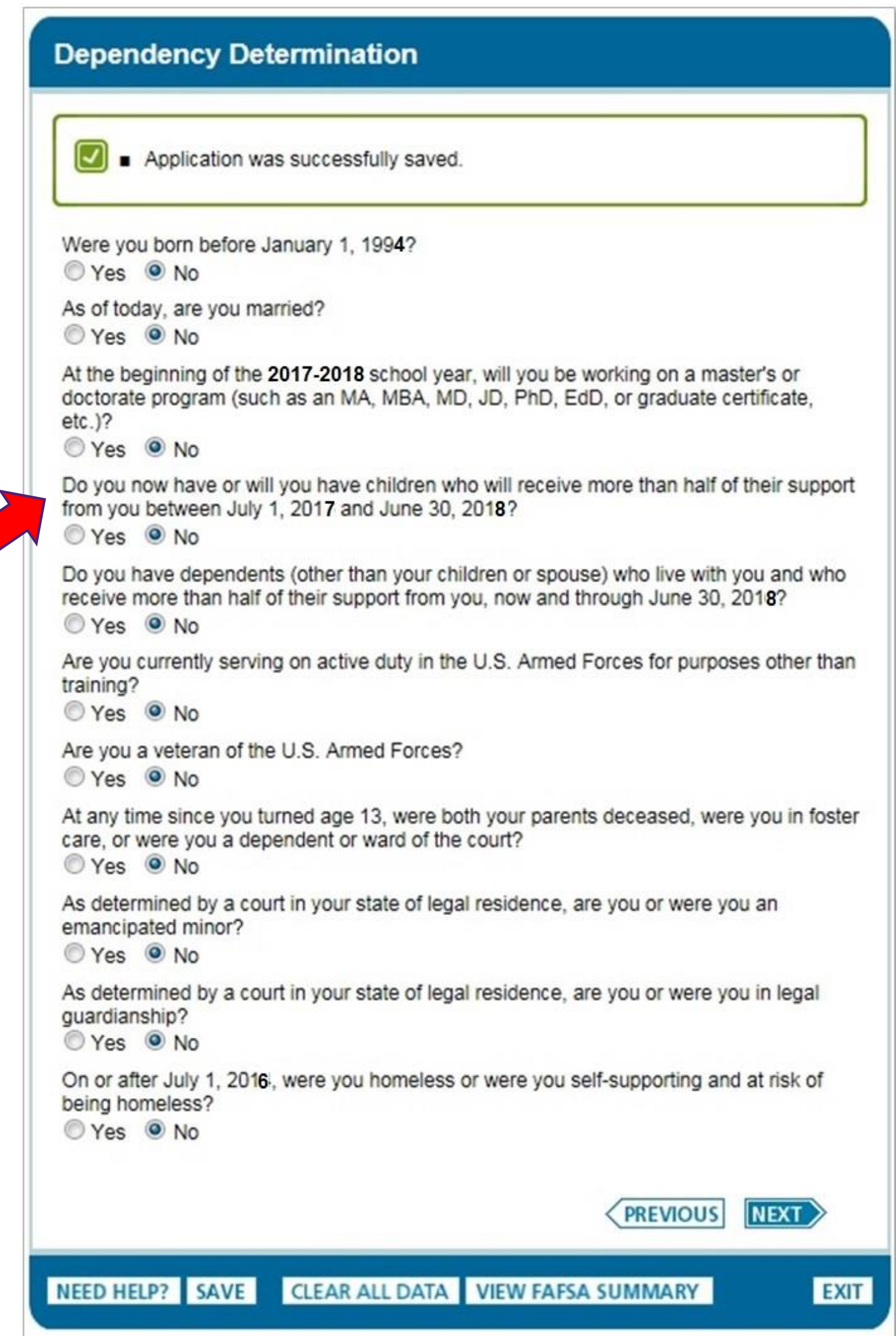


Dependency Determination

NO to all questions:

- makes the student “dependent”
- Must submit parent information

Note: Child must be supported financially — *more than 50%*



The screenshot shows the 'Dependency Determination' section of the FAFSA form. At the top, a green box with a checkmark icon and the text 'Application was successfully saved.' is visible. Below this, a series of questions are listed, each with 'Yes' and 'No' radio button options. A red arrow points to the question: 'Do you now have or will you have children who will receive more than half of their support from you between July 1, 2017 and June 30, 2018?'. The 'No' option is selected for this question. Other questions include: 'Were you born before January 1, 1994?', 'As of today, are you married?', 'At the beginning of the 2017-2018 school year, will you be working on a master's or doctorate program...', 'Do you have dependents (other than your children or spouse) who live with you and who receive more than half of their support from you, now and through June 30, 2018?', 'Are you currently serving on active duty in the U.S. Armed Forces for purposes other than training?', 'Are you a veteran of the U.S. Armed Forces?', 'At any time since you turned age 13, were both your parents deceased, were you in foster care, or were you a dependent or ward of the court?', 'As determined by a court in your state of legal residence, are you or were you an emancipated minor?', 'As determined by a court in your state of legal residence, are you or were you in legal guardianship?', and 'On or after July 1, 2016, were you homeless or were you self-supporting and at risk of being homeless?'. At the bottom of the form, there are navigation buttons: 'PREVIOUS', 'NEXT', 'NEED HELP?', 'SAVE', 'CLEAR ALL DATA', 'VIEW FAFSA SUMMARY', and 'EXIT'.

Dependency Determination

☒ Application was successfully saved.

Were you born before January 1, 1994?
☐ Yes ☒ No

As of today, are you married?
☐ Yes ☒ No

At the beginning of the 2017-2018 school year, will you be working on a master's or doctorate program (such as an MA, MBA, MD, JD, PhD, EdD, or graduate certificate, etc.)?
☐ Yes ☒ No

Do you now have or will you have children who will receive more than half of their support from you between July 1, 2017 and June 30, 2018?
☐ Yes ☒ No

Do you have dependents (other than your children or spouse) who live with you and who receive more than half of their support from you, now and through June 30, 2018?
☐ Yes ☒ No

Are you currently serving on active duty in the U.S. Armed Forces for purposes other than training?
☐ Yes ☒ No

Are you a veteran of the U.S. Armed Forces?
☐ Yes ☒ No

At any time since you turned age 13, were both your parents deceased, were you in foster care, or were you a dependent or ward of the court?
☐ Yes ☒ No

As determined by a court in your state of legal residence, are you or were you an emancipated minor?
☐ Yes ☒ No

As determined by a court in your state of legal residence, are you or were you in legal guardianship?
☐ Yes ☒ No

On or after July 1, 2016, were you homeless or were you self-supporting and at risk of being homeless?
☐ Yes ☒ No

PREVIOUS NEXT

NEED HELP? SAVE CLEAR ALL DATA VIEW FAFSA SUMMARY EXIT

Foster Youth

Select **YES** if at any time since the student turned age **13**, he/she was in foster care even if no longer in foster care today due to:

- Adoption
- Reunification
- Reached the age of majority (18 yrs.)

Note: Documentation may be required

Emancipated Minors

Select **YES** if the student:

- as of today, is an emancipated minor, or
- was an emancipated minor immediately before turning 18 years old

Note: Documentation (issued from a court in the student's state of legal residence) may be required

Legal Guardianship

YES, if...	NO, if...
Student can provide a copy of a court's decision that as of today he or she is in a legal guardianship.	Student is still a minor and the court decision is no longer in effect.
Student can provide a copy of a court's decision that he or she was in a legal guardianship immediately before he or she reached the age of being an adult in his or her state.	The court decision was not in effect at the time the student became an adult.
The court was located in the state of legal residence for the student at the time the court's decision was issued.	The guardianship was established by an attorney but not ordered by a court.

Homeless, Unaccompanied Youth

Select **YES** if any time after **July 1, 2016**, the student meets **ALL three criteria**

“Homeless” or “at risk of being homeless”

- Lacking fixed, regular and adequate housing. Includes living in shelters, parks, motels or cars, or temporarily living with other people because the student has nowhere else to go, **AND**

“Unaccompanied”

- Not in the physical custody of a parent or guardian, **AND**

“Youth”

- Under **24** years of age **[THIS IS A CHANGE FROM PRIOR YEARS]**

Resource for homeless students: **NAEH CY.org**



Homeless, Unaccompanied Youth

Students are considered to be **independent** if they are determined to be **Homeless Unaccompanied Youth** by:

- The student's high school or school district homeless liaison, **or**
- The director of an emergency shelter or transitional housing program funding by HUD, **or**
- The director of an a runaway or homeless youth basic center or transitional living program, **or**
- The college's financial aid administrator determines they meet the requirements for consideration

What if...


Dependency Status Results

Based on your answers to the dependency status questions, you are considered a **dependent student**. This means you must provide parental information. Select "I will provide parental information" and click **Next** to continue to Parent Demographics.

If you have a special circumstance and are unable to provide parental information, under very limited circumstances, you may be able to submit your FAFSA without parental information. Select "I am unable to provide parental information" and click **Next** to get additional information.

☐ I will provide parental information

☒ I am unable to provide parental information



[PREVIOUS](#) [NEXT](#)

[NEED HELP?](#) [SAVE](#) [CLEAR ALL DATA](#) [VIEW FAFSA SUMMARY](#) [EXIT](#)

Help and Hints

Dependency Status Results

For dependent students, a special circumstance is a situation that exists between the student applicant and his or her parent(s) which prevents the student from providing parental information.

Select **I will provide parental information** to continue to Parent Demographics.

Select **I am unable to provide parental information** to get additional information about special circumstances.

...then...

- Colleges have the authority to “override” federal dependency status
- Process will vary college to college

Note: Student **MUST** follow up with college

Special Circumstances

Important: You told us that you think you have a special circumstance and are unable to provide parental information. Before we allow you to proceed and skip the parental section of your FAFSA we must advise you of the following:

Under Federal law to the extent your family is able, they are primarily responsible for paying for your college expenses. To determine how much your family can afford to pay towards your college expenses, we must collect your financial information and your parents' financial information.

However, Federal law allows for some exceptions, if you have a **special circumstance**. The following are **examples** of some special circumstances where you may submit your FAFSA without providing parental information:

- Your parents are incarcerated; or
- You have left home due to an abusive family environment; or
- You do not know where your parents are and are unable to contact them (and you have not been adopted).

But not all situations are considered a special circumstance. The following are situations that would **not** be considered a special circumstance:

- Your parents do not want to provide their information on your FAFSA; or
- Your parents refuse to contribute to your college expenses; or
- Your parents do not claim you as a dependent on their income taxes; or
- You do not live with your parents.

Now that you have reviewed the information above, select one of the following options and click **Next** to continue.

- ☐ I will provide parental information
- ☒ I have a special circumstance and I am unable to provide parental information
- ☐ I do not have a special circumstance but I am unable to provide parental information

PREVIOUS

NEXT

Step 4:

Parental Information for Dependent Students

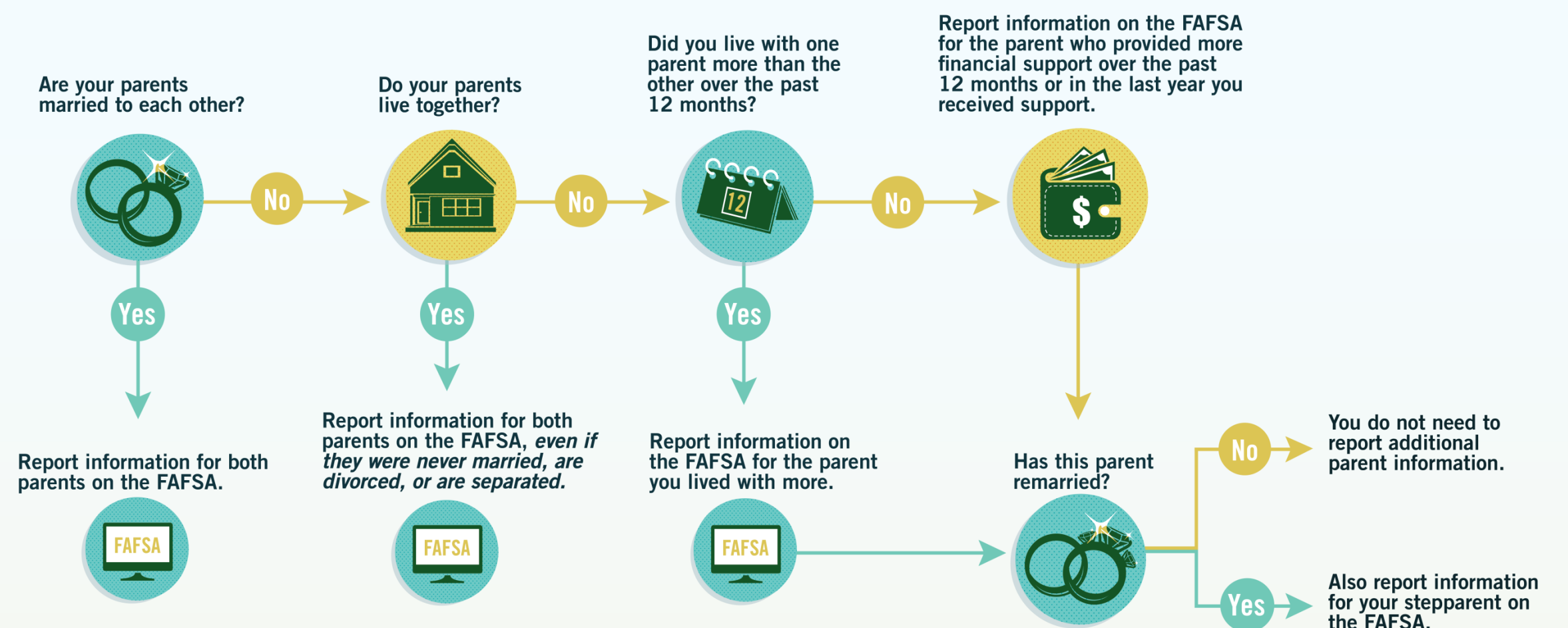


Whose info goes on a FAFSA?

WHO'S MY PARENT WHEN I FILL OUT MY FAFSA?

Dependent students are required to report parent information on the *Free Application for Federal Student Aid* (FAFSA).¹ For reporting purposes, "PARENT" means your legal (biological or adoptive) parent or stepparent, or a person that the state has determined to be your legal parent.

Use this guide to figure out which parent's information to include (depending on your family situation).



The following people are not your parents unless they have legally adopted you:



Widowed Stepparent



Grandparents



Foster Parents



Legal Guardians



Older Brothers or Sisters



Aunts or Uncles

If you're not sure whom to report as a parent, you can visit [StudentAid.ed.gov/fafsa/filling-out/parent-info](https://studentaid.ed.gov/fafsa/filling-out/parent-info) or call 800-4-FED-AID (800-433-3243).

¹ If you're not sure whether you are a dependent student, go to [StudentAid.gov/fafsa/filling-out/dependency](https://studentaid.gov/fafsa/filling-out/dependency)

Federal Student Aid
An OFFICE of the U.S. DEPARTMENT of EDUCATION

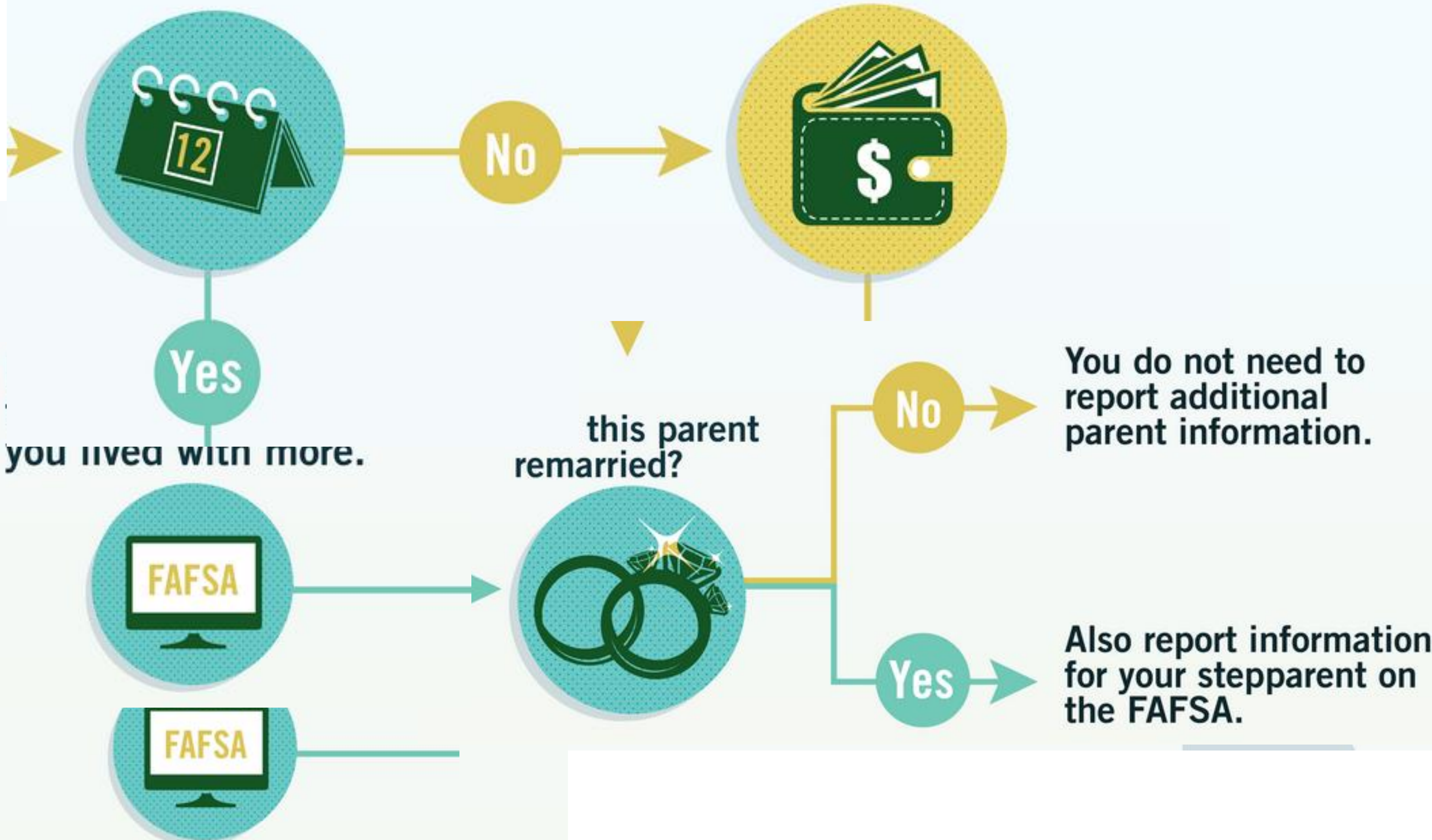
PROUD SPONSOR of
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<https://studentaid.ed.gov/sa/sites/default/files/who-is-my-parent.png>



Did you live with one parent more than the other over the past 12 months?

Report information on the FAFSA for the parent who provided more financial support over the past 12 months or in the last year you received support.



The following people are not your parents unless they have legally adopted you:



**Widowed
Stepparent**



Aunts or Uncles



Foster Parents



Grandparents

Aunts or Uncles



**Older Brothers
or Sisters**



**Older Brothers
or Sisters**



Legal Guardians

Responses on the FAFSA

Never Married

Unmarried and both parents living together

Married or Remarried

Divorced or Separated

Widowed

Divorced or Separated Parents

- Provide information for the parent(s) with whom the student lived with most during the 12 months prior to filing the FAFSA
- If the student spent equal time with both parents, use the information for the parent who provided the greatest amount of financial support for the student in the 12 months prior to filing the FAFSA
- If both parents are still living together, use information for both parents on FAFSA

Remarried Parent

Provide information about the custodial parent *and stepparent* regardless of:

- Agreement of “nonsupport”
- Prenuptial agreement
- Divorce decree designating tax filing exemptions

Note: A parent claiming the student on his or her tax return need not be the parent required to provide data on the FAFSA

Note: Children of parent and stepparent should be included in the household size and number in college questions on the FAFSA (if they provided and will continue to provide more than half of their support for the coming academic year)

NO Parental Information



Do not provide parent information for

- **Foster parent(s)**
 - Student is automatically considered an independent student
- **Grandparents, other relatives, or guardian(s)**
 - Colleges may use professional judgment to allow the student to file as an independent student
 - **Exception:** Adoptive parents

Parent Information

- Demographics
- Marital status will determine what questions are asked of the parent(s)

Parent Demographics Information

☒ Application was successfully saved.

As of today, what is the marital status of your legal [parents](#) (biological and/or adoptive)?

Married or Remarried

When did your parents get married or remarried? Enter the month and year. (mmyyyy)

08/1990

What is your father's/stepfather's Social Security Number?	What is your father's/stepfather's last name?
	Smith
What is your father's/stepfather's first initial?	What is your father's/stepfather's date of birth? (mmddyyyy)
J	01/01/1970
What is your mother's/stepmother's Social Security Number?	What is your mother's/stepmother's last name?
	McConnell
What is your mother's/stepmother's first initial?	What is your mother's/stepmother's date of birth? (mmddyyyy)
K	04/18/1972

Your parents' e-mail address

@emailworld.com

Re-enter your parents' e-mail address

@emailworld.com

Have your parents lived in California for at least 5 years?

☒ Yes ☐ No

Parent Information

- **Household Size:**
Parent provides more than 50% financial support
- **Number in College:**
Students enrolled at least half-time

Your parents' number of family members in 2017-2018 (household size)
If you are not sure who is considered a family member, click **Household Size** to answer the questions on the worksheet.

HOUSEHOLD SIZE

How many people in your parents' household will be college students between July 1, 2017 and June 30, 2018? Do not include your parents.

[PREVIOUS](#) [NEXT](#)

[NEED HELP?](#) [SAVE](#) [CLEAR ALL DATA](#) [VIEW FAFSA SUMMARY](#) [EXIT](#)

Parent Income Information

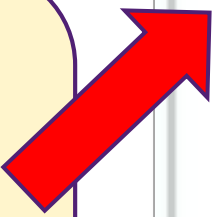
IRS Data Retrieval Tool (DRT)

- Transfers information directly from the IRS
 - Requires **FSA ID**
 - Available as of October 1st
 - Available after filing 2015 federal tax return
 - **3⁺** weeks after electronic filing
 - **11⁺** weeks after paper filing

The screenshot displays the 'Parent Tax Information' form. At the top, a green box indicates 'Application was successfully saved.' Below this, two questions are asked: 'For 2015 have your parents completed their IRS income tax return or another tax return?' with a dropdown menu set to 'Already completed', and 'For 2015 what is your parents' tax filing status according to their tax return?' with a dropdown menu set to 'Married-Filed Joint Return'. A message states: 'You, the parents, may be able to use the IRS Data Retrieval Tool to view and transfer your tax information from the IRS.' Three questions follow with radio button options: 'Did you, the parents, file a Form 1040X amended tax return?' (Yes/No), 'Did you, the parents, file a Puerto Rican or foreign tax return?' (Yes/No), and 'Did you, the parents, file taxes electronically in the last 3 weeks (or by mail in the last 11 weeks)?' (Yes/No). A recommendation box states: 'Based on your response, we recommend that you, the parents, transfer your information from the IRS into this FAFSA. [How you filed your taxes](#) can affect whether your tax return information is available to transfer.' Below this, instructions say 'Enter your FSA ID and click Link To IRS.' A dropdown menu for 'Which parent are you?' is set to 'Select'. A text field asks 'What is your (the parent's) FSA ID?'. Below that, there are fields for 'FSA ID Username or Verified E-mail Address' and 'FSA ID Password'. To the right of these fields are links: 'Create an FSA ID', 'Forgot Username', 'Forgot Password', and a blue 'LINK TO IRS' button. At the bottom right are 'PREVIOUS' and 'NEXT' buttons. At the bottom left are buttons for 'NEED HELP?', 'SAVE', 'CLEAR ALL DATA', 'VIEW FAFSA SUMMARY', and 'EXIT'.

Parent Asset Information

Note: Asset filtering question



As of today, does the total amount of your parents' current [assets](#) exceed \$36,300.00?
☒ Yes ☐ No

As of today, what is your parents' total current balance of cash, savings, and checking accounts?
\$.00

As of today, what is the net worth of your parents' investments, including real estate (not your parents' home)?
\$.00

As of today, what is the net worth of your parents' current businesses and/or investment farms?
\$.00

[PREVIOUS](#) [NEXT](#)

[NEED HELP?](#) [SAVE](#) [CLEAR ALL DATA](#) [VIEW FAFSA SUMMARY](#) [EXIT](#)

Step 5:

Student Income and Assets



Student Income & Assets

- Same questions as asked of parents
- If student will not file a tax return, they may still be asked:
 - Amount earned from work
 - Asset information



The screenshot shows a web form titled "Student Tax Information". The main question is "For 2015 have you completed your IRS income tax return or another tax return?". Below this is a dropdown menu with the selected option "Not going to file". To the right of the dropdown are two buttons: "PREVIOUS" and "NEXT". At the bottom of the form is a blue bar containing five buttons: "NEED HELP?", "SAVE", "CLEAR ALL DATA", "VIEW FAFSA SUMMARY", and "EXIT".

Step 6: Signatures and Certification



Sign and Submit (Student)



Select signature method

- **FSA ID** or printed signature page

Terms of Agreement

- \$\$\$ to be used for *education-related expenses* only
- Student is not in default on a federal student loan
- Student does not owe a refund of a federal Title IV grant
- Can receive Federal Pell Grant from only one college for the same period of time
- Agree to provide tax information and other requested documents

Sign & Submit

☒ Application was successfully saved.

[VIEW OR PRINT YOUR FAFSA INFORMATION](#)

Are you a [preparer](#)?

☐ Yes ☒ No

Student Signature

Student's Social Security Number

Student's last name

Student's date of birth

READ BEFORE PROCEEDING

By signing this application electronically using your Federal Student Aid PIN, username and password, and/or any other credential or by signing a signature page and mailing it to us, YOU, THE STUDENT, certify that you:

1. will use federal and/or state student financial aid only to pay the cost of attending an institution of higher education,
2. are not in default on a federal student loan or have made satisfactory arrangements to repay it,
3. do not owe money back on a federal student grant or have made satisfactory arrangements to repay it,
4. will notify your school if you default on a federal student loan, and
5. will not receive a Federal Pell Grant from more than one school for the same

I, the student, agree to the terms outlined above.

☐ Agree ☒ Disagree

What is your (the student's) FSA ID?

Do not enter the FSA ID if you are not the student.

FSA ID Username or Verified E-mail Address

FSA ID Password

[Other options to sign and submit](#)

[SIGN](#)

Parent Signature

Don't have an FSA ID? [Create an FSA ID](#). It takes only a few minutes.

Sign and Submit (Parent)



Select signature method

- **FSA ID** or printed signature page

Terms of Agreement

- Provide documents to verify accuracy of information (if requested)
- IRS verification

Parent Signature

Are you signing as the student's Parent 1 (father/mother/stepparent), or Parent 2 (father/mother/stepparent)?

☒ Parent 1 (Father/Mother/Stepparent) ☐ Parent 2 (Father/Mother/Stepparent)

Information about Parent 1 (father/mother/stepparent):

Parent 1 (father's/mother's/stepparent's) Social Security Number

Parent 1 (father's/mother's/stepparent's) last name

Parent 1 (father's/mother's/stepparent's) date of birth

READ BEFORE PROCEEDING

By signing this application electronically using your Federal Student Aid PIN, username and password, and/or any other credential or by signing a signature page and mailing it to us, YOU, THE PARENT, certify that all of the information you provided is true and complete to the best of your knowledge and you agree, if asked:

1. to provide information that will verify the accuracy of your completed form
2. to provide U.S. or state income tax forms that you filed or are required to file.

You also certify that you understand that the Secretary of Education has the authority to verify information reported on your application with the Internal Revenue Service and other federal agencies.

I, the parent, agree to the terms outlined above.

☐ Agree ☒ Disagree

What is your (the parent's) FSA ID?

Do not enter the FSA ID if you are not the parent.

FSA ID Username or Verified E-mail Address

FSA ID Password

[Create an FSA ID](#)

[Forgot Username](#)

[Forgot Password](#)

[Other options to sign and submit](#)

Step 7: Confirmation



ECMC




Confirmation Page

- Confirmation number
- Data Release Number (DRN)
- Optional feature: transfer FAFSA data
- Eligibility information
- College information
- Next steps

2016-2017 Confirmation Page


age


 Your confirmation page has been sent to you at the e-mail address: random@fsa.gov


[PRINT THIS PAGE](#)

Confirmation Number: F 01500243001 11/19/2013 13:55:26
Data Release Number (DRN): 6634

Congratulations, Student! Your FAFSA was successfully submitted to Federal Student Aid.

 Does your brother or sister need to complete a FAFSA? If so, you can [transfer your parents' information into a new FAFSA](#) for your brother or sister to save time. Your parents will have to provide a signature again, but that's all.


 [Start your state application](#) to apply for Iowa state-based financial aid.

 What Happens Next

- You will receive an e-mail version of this page.
- In 3-5 business days, you will receive an e-mail notifying you that your FAFSA was processed.
- Your FAFSA information will be made available to your school(s), and they will use it to determine the aid you may be eligible to receive.
- Your school(s) will contact you if they need more information or when they are ready to discuss your financial aid award.
- If you have questions about your financial aid package, contact your school(s).

School(s) on your FAFSA:

School Name	Graduation Rate	Retention Rate	Transfer Rate	Additional Information from College Navigator
UNIV OF ILLINOIS @ URBANA-CHAMPAIGN	84%	94%	NA	NA
ALABAMA AGRCLTL & MECHL UNIV	32%	68%	NA	NA
UNIVERSITY OF IOWA	70%	86%	24%	NA

 Eligibility Information

Estimated Expected Family Contribution (EFC) = 000000
The EFC is a measure of how much you can contribute to the cost of your education. Schools use your EFC to determine your federal student aid eligibility.

The EFC is not how much aid you will receive or how much you have to pay for college.

Based on the [eligibility criteria](#), you may be eligible for the following:

[Pell Grant](#) Estimate - \$5,645.00


[Direct Stafford Loan](#) Estimate - \$5,500.00
You may also be eligible to receive other federal, state, or institutional grants, scholarships, and/or work-study.

In addition, you should learn about [federal tax benefits for education](#), including the *American Opportunity Tax Credit* (AOTC).


You and your parent(s) indicated that you had filed an IRS tax return when you provided your financial information and it appears that you were eligible to use the [IRS Data Retrieval Tool](#), which allows you to view information from your IRS tax return and transfer that information directly into your FAFSA. The benefit of using the tool is that it's the easiest way to provide accurate tax information, and it also eliminates the need for providing a copy of your and your parents' tax return to the financial aid office at your college. Once your FAFSA has been processed, you and your parents can return to *FAFSA on the Web* and use the tool to transfer your tax information.

If you have questions, visit [www.fafsa.gov](#) and click the "Help" icon on the FAFSA home page.

0

 Share

0

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[TAKE A SURVEY](#)

EXIT

Student Aid Report (SAR) and Acknowledgement

- Sent electronically or by mail
- Summarizes FAFSA information
- Displays **EFC** and **DRN**
(upper right-hand area on the SAR)

EFC - Expected Family Contribution
Used to determine eligibility for federal aid

DRN - Data Release Number
Used to send SAR to additional schools

Federal Student Aid
OFFICE OF THE U.S. DEPARTMENT OF EDUCATION
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**STUDENT AID REPORT
2017-2018**

WWW.FAFSA.GOV
APRIL 22, 2017
000001C001
JOHN SMITH
742 EVERGREEN TERRACE
SPRINGFIELD OH 55555

OMB No. 1845-0001
DATA RELEASE NUMBER (DRN): 9755
EXPECTED FAMILY CONTRIBUTION (EFC): 000000^C

Dear JOHN SMITH,
Your Student Aid Report (SAR) summarizes the information you submitted on your 2017-2018 Free Application for Federal Student Aid (FAFSA).

Application Status (review the checked boxes)

☒ Your FAFSA appears to be complete. Review the data on pages 3-10 of your SAR and make corrections or updates if necessary. The school(s) listed on your FAFSA will receive your information.

☒ Your FAFSA has been selected for verification. Verification is a process where your school confirms the data you reported on your FAFSA. Your school has the authority to contact you for documentation that supports income and other information that you reported on your FAFSA.

Federal Student Aid Eligibility (review the checked boxes)

The data submitted on your FAFSA is used to calculate your Expected Family Contribution (EFC), which is 000000.

The EFC is not the amount of money that your family must provide. Rather, you should think of the EFC as an index that colleges use to determine how much financial aid you would receive if you were to attend their school. Financial aid may include grants (free funds that do not have to be repaid), work-study (paid part-time employment), and/or low-interest loans (borrowed funds that must be repaid). Please note that your EFC is subject to change if you update or correct your FAFSA.

Your financial aid package could also include other federal, state, or institutional grants and scholarships, and/or a work-study award. Your school's financial aid office will advise you of the specific types and amounts of student aid you are eligible to receive. For more information about the EFC, grants, loans, work-study, scholarships and other sources of aid, go to StudentAid.gov.

☒ Based on your EFC it appears that you may be eligible for a Federal Pell Grant of up to \$5775, provided you have not met or exceeded the lifetime limit established for the Federal Pell Grant program. You may also be eligible for other grants, work-study opportunities, and low-interest student loans.

☒ We sent your information to other federal agencies to verify your eligibility for federal student aid and there appears to be an issue with the information provided on your application. Review the checklist on page 3 for instructions on how to resolve these issues.

You should keep this SAR for your records!

R5EN000001 999
PAGE 1 OF 10
01234567891SM01

FAFSA Demonstration Website

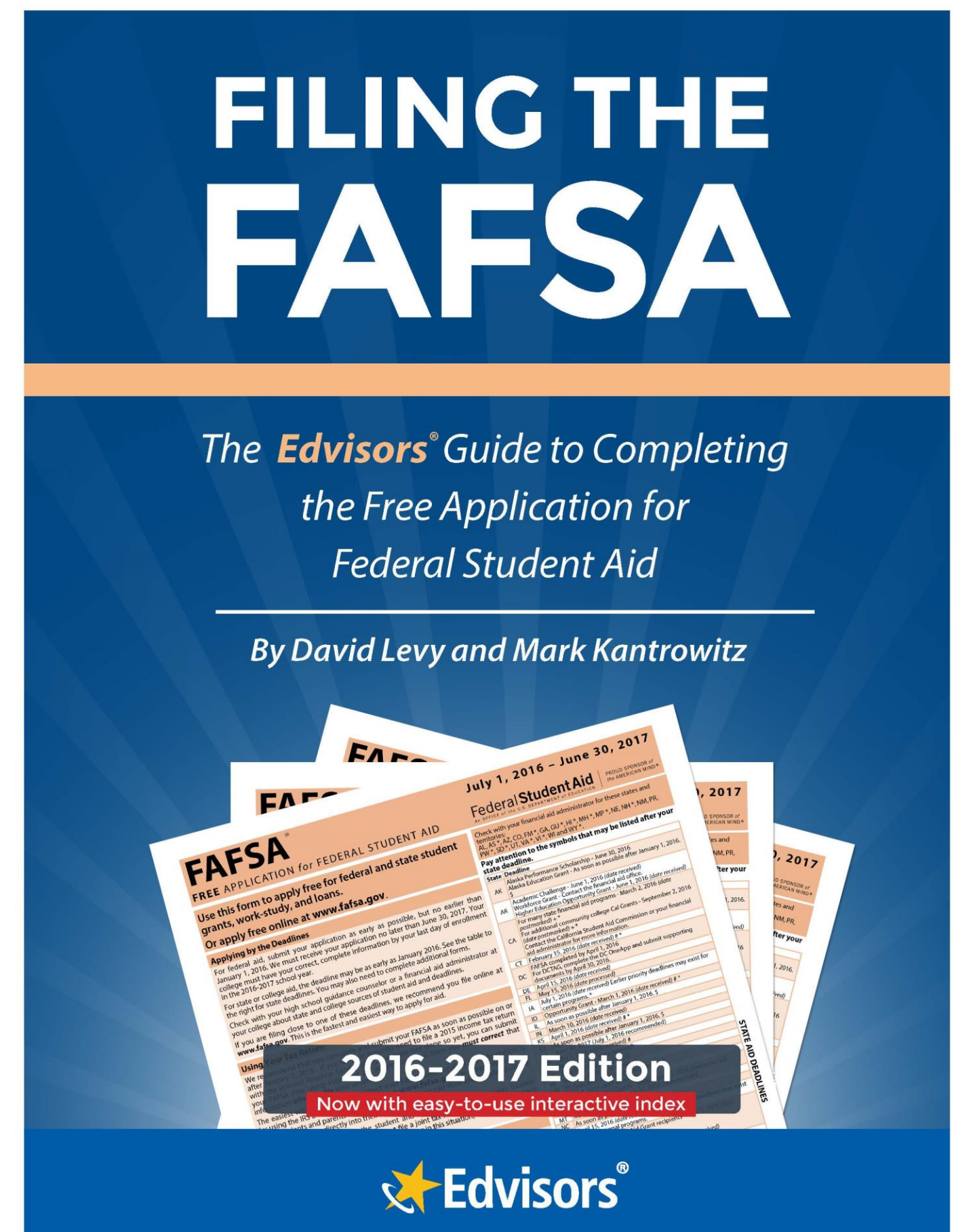
fafsademotest.ed.gov

- **Username:** eddemo
- **Password:** fafsatest
- 2017-2018 test system available **September 26th**



Free Book about Filing the FAFSA

- 200 page book about completing the Free Application for Federal Student Aid (FAFSA)
- Maximize eligibility for student aid
- Avoid common errors
- Complete the form quickly, easily and accurately
- **FREE** PDF version download at:
edvisors.com/fafsa-book



Student Survival Guide – A step-by-step checklist

What is it?

- A map of what every student needs to do in each year before and during college, starting from 9th grade
- All the steps were provided by students who have successfully gone through the process and are sharing their advice

Why use it?

- Get a blueprint with all the steps needed to get into and through college
- A way to keep track of your progress
- Easy to use and share
- **It's completely FREE**

Where to get it:

edvisors.com/get-survival-guide/

The screenshot displays the 'Student Survival Guide' interface. At the top, there are tabs for 'High School' and 'College', with 'High School' selected. To the right are buttons for 'Save Survival Guide' and 'Download'. Below these are tabs for 'HS Freshman', 'HS Sophomore', 'HS Junior', 'HS Senior Fall', and 'HS Senior Spring', with 'HS Senior Fall' selected. The main heading is 'High School Senior Year - Fall'. A progress bar shows '13% Complete!'. There are buttons for 'Expand All' and 'Collapse All'. The checklist items are:

- ☒ If you haven't visited campus, try to plan a trip! If you've visited schools you're interested already, try to plan a second visit to the schools you are considering. **TIP:** If possible, arrange an overnight stay in the dorms with the admissions office. Even if you're not planning on living on campus, you can get a feel for what life there is really like by exploring the campus yourself or with a current student.
- ☒ Continue writing your college essays. **TIP:** If you're having trouble with your college essays, consider asking someone like your English teacher or guidance counselor to help you review them.
- ☐ Retake the SAT and/or ACT, if necessary.
- ☐ Meet with your guidance counselor or contact the financial aid or admissions offices at schools you're interested in for any questions and advice regarding college-related topics. **QUESTION:** How do I apply for need-based and/or merit-based financial aid?

Reference Materials

[**casfaa.org/hsrc**](http://casfaa.org/hsrc)

[**www.csac.ca.gov/**](http://www.csac.ca.gov/doc.asp?id=1438)

[**doc.asp?id=1438**](http://www.csac.ca.gov/doc.asp?id=1438)



Questions?



ECMC

